

# Forbes | SHOOK

## ON-THE-ROAD

### The Maybourne, Beverly Hills

Thursday,  
March 9, 2023

TIME	SESSION & SPEAKER
12:00-12:10 pm	<b>We're Here on Purpose</b> — <b>R.J. Shook</b> , Co-Founder & President, SHOOK Research & Senior Forbes Contributor
12:10-12:15 pm	<b>SHOOK Ones - My Best Idea</b> — <b>Steve Hepp</b> , Merrill Lynch Wealth Management — <b>Madison Rizzo</b> , Analyst, SHOOK Research
12:15-12:35 pm	<b>Leveraging Industry Insights to Optimize Top-Performing Practices</b> — <b>Tim Wilkinson</b> , Senior Director, Executive Consultant, Invesco Global Consulting — <b>Chris Collie</b> , Vice President, Invesco
12:35-12:55 pm	<b>Team Structures and Efficiencies</b> — <b>Carol Wilshire</b> , RBC Wealth Management — <b>John Shadden</b> , Morgan Stanley Private Wealth Management — Moderator: <b>Michael Schweitzer</b> , Head of Retail Distribution, Janus Henderson Investors
12:55-1:15 pm	<b>Navigating the High Seas: ETF Positioning Ideas of Q1 2023</b> — <b>Ryan Issakainen</b> , Senior Vice President, ETF Strategist, First Trust
1:15-1:20 pm	<b>SHOOK Ones - My Best Idea</b> — <b>John Halperin</b> , UBS Wealth Management — <b>Erick Lopez</b> , Senior Analyst, SHOOK Research
1:20-1:40 pm	<b>Choosing the Right Alternatives for an Inflationary Environment</b> — <b>Chris Sullivan</b> , Sr. Managing Director, Blackstone Credit — <b>David Levine</b> , Sr. Managing Director, Blackstone Real Estate — Moderator: <b>Mike Kanigher</b> , UBS Private Wealth Management — <b>Bill Tugurian</b> , Managing Director, Blackstone Private Wealth Solutions
1:40-2:00 pm	<b>Refreshment Break</b>
2:00-2:25 pm	<b>Market Outlook: The Great Balancing Act</b> — <b>Mike Arone</b> , Chief Investment Strategist, State Street Global Advisors SPDR ETFs — Moderator: <b>Brian Farring</b> , Wells Fargo Advisors — <b>Darius Tandy</b> , Vice President, State Street Global Advisors ETFs
2:25-2:30 pm	<b>SHOOK Ones - My Best Idea</b> — <b>Jeff Germain</b> , Wells Fargo Advisors — <b>Luke Bartow</b> , Senior Analyst, SHOOK Research
2:30-2:50 pm	<b>Wealth Advisor's Guide</b> — <b>Matt Sommer</b> , Head of Specialist Consulting Group, Janus Henderson Investors — <b>Daniel Reams</b> , Director, Advisor Solutions Group, Janus Henderson Investors
2:50-3:35 pm	<b>Fireside chat with Jeffrey Gundlach</b> — <b>Jeffrey Gundlach</b> , CEO, DoubleLine Capital — Moderator: <b>Alex Shahidi</b> , Co-CIO, Evoke Advisors
3:35-3:55 pm	<b>Synergist Teams: Fostering a Solid Team Vibe</b> — <b>Marc Rosenbach</b> , Wells Fargo Advisors — <b>Wendy Spinner</b> , UBS Private Wealth Management — Moderator: <b>Nick Cirbo</b> , Senior Advisor Consultant, Invesco — <b>Erica Horak</b> , Analyst, SHOOK Research

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### TIME

### SESSION & SPEAKER

3:55-4:00 pm

The Last Word

— [Frank Berland](#), Managing Partner, SHOOK Research

4:00-5:00 pm

Cocktail Reception

Dine-arounds with Partners Following